

OUTCOME-MILESTONE PAYMENT TABLE
CHART I—NEW OUTCOME-MILESTONE PAYMENT TABLE
[2008 figures for illustration only]

Payment type	Beneficiary earnings	Title II amount of payment	Title XVI amount of payment
Phase 1 (120% of Title II PCB)			
Milestone 1	\$335/mo. \$670/mo. × 3 mo. work in a 6-month period.	\$1,177	\$1,177
Milestone 2	\$1,177	\$1,177.	
Milestone 3	\$670/mo. × 6 mo. work in a 12-month period.	\$1,177	\$1,177
Milestone 4	\$670/mo. × 9 mo. work in an 18-month period.	\$1,177	\$1,177
Total Phase 1 milestones.		\$4,708	\$4,708
Phase 2 (36% of PCB)	Gross Earnings>SGA		
Title II milestones 1–11	\$353 × 11 = \$3,883		
Title XVI milestones 1–18	\$203 × 18 = \$3,654.		
Total Phase 1 + 2	\$8,591	\$8,362.	
	Outcome payments (36% of PCB).		
Title II = 1–36	Monthly cash benefit not payable due to SGA.	\$353 × 36 = \$12,708	
Title XVI = 1–60	Sufficient earnings for federal cash benefits = “0”.	203 × 60 = \$12,180.	
Total milestone and outcome payments.	\$21,299	\$20,542.	

Definitions and amounts: Payment Calculation Base (PCB)—The average title II disability insurance benefit payable under section 223 of the Social Security Act for all beneficiaries for months during the preceding calendar year; and the average payment of supplemental security income benefits based on disability payable under title XVI (excluding State supplementation) for months during the preceding calendar year to all beneficiaries who have attained 18 years of age but have not attained 65 years of age. (2008 title II = \$981.17, title XVI = \$563.35).

Gross earnings requirements for Phase 1 are based on Trial Work level amounts.

For Phase 1 milestones only, the payments are calculated for both title XVI and title II beneficiaries using the higher title II payment calculation base. All other payments are based on a percentage of the Payment Calculation Base (PCB) for the respective program (title XVI or title II). See § 411.535 for a discussion of the circumstances under which we will pay milestones.

Phase 1 milestones = 120% of PCB.

Phase 2 milestones = 36% of PCB.

Outcome payments (under the outcome-milestone payment system) = 36% of PCB Earnings used to meet the first, second, or third Phase 1 milestone may be counted again when determining if a later milestone is met, provided the earlier earnings fall within the relevant time period for meeting the later Phase 1 milestone (see 411.525(a)(2) for the relevant time period for each milestone).

[73 FR 29348, May 20, 2008]

§ 411.550 How are the outcome payments calculated under the outcome payment system?

The amount of each monthly outcome payment under the outcome payment system is calculated as follows:

(1) For title II disability beneficiaries (including concurrent title II/title XVI disability beneficiaries), an outcome payment is equal to 67% of the payment calculation base as defined in § 411.500(a)(1) for the calendar year in which the month occurs, rounded to the nearest whole dollar;

(2) For title XVI disability beneficiaries (who are not concurrently

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title II/title XVI disability beneficiaries), an outcome payment is equal to 67% of the payment calculation base as defined in §411.500(a)(2) for the calendar year in which the month occurs, rounded to the nearest whole dollar.

CHART II—NEW OUTCOME PAYMENT SYSTEM TABLE—TITLE II AND CONCURRENT
[2008 figures for illustration only]

Payment type	Beneficiary earnings	Title II amount of monthly outcome payment	Title II total outcome payments
Outcome payments 1–36 (67% of PCB)	Monthly cash benefit not payable due to SGA	\$657.00	\$23,652

CHART III—NEW OUTCOME PAYMENT SYSTEM TABLE—TITLE XVI ONLY
[2008 figures for illustration only]

Payment type	Beneficiary earnings	Title XVI amount of monthly outcome payment	Title XVI total outcome payments
Outcome payments 1–60 (67% of PCB)	Earnings sufficient to “0” out Federal SSI cash benefits.	\$377.00	\$22,620

NOTE: Outcome payment (outcome payment system) = 67% of PCB Individual payments are rounded to the nearest dollar amount.

2008 non-blind SGA level = \$940.

2008 Blind SGA = \$1570.

2008 TWP service amount = \$670.

[73 FR 29348, May 20, 2008]

§411.551 How are EN payments calculated for transition cases pending on July 21, 2008?

A *Transition case* is a case where a ticket had been assigned and milestones or outcomes had been attained as of June 30, 2008 (that is, the individual has completed the necessary work to trigger a milestone or outcome payment before July 21, 2008 regardless of whether the payment has actually been made). We will pay outcome and milestone payments at the rate in effect when the work leading to such outcome or milestone is attained. Since milestone and outcome payments are numbered and attained in sequence, the EN must request the final payment for which it expects payment under the prior rules before we can determine the number of the milestone or outcome payment that represents the first payment after July 21, 2008. In addition, for cases on which an EN has attained an outcome payment before July 21, 2008 we must know the sum of the amount paid on the ticket before we can determine the remaining amount that can be paid in outcome

payments on the ticket. Therefore, with respect to a ticket, we will only accept payment requests for milestones or outcomes attained under the prior rules until March 31, 2009 or until we make the first payment on the ticket under §411.525. Payments to an EN (or State VR agency acting as an EN) after July 21, 2008 on a transition case will be made as follows:

(a) The four milestones under the prior rules will be equated with the four Phase 1 milestones available under the rules after July 21, 2008. For example, if a beneficiary had attained milestone 1 under our prior rules (1 month above the gross SGA level, e.g., \$940 in 2008), then the next milestone to be achieved would be Phase 1 milestone 2 under these rules (work in three months with gross earnings in each of these months equal to a trial work period service month, e.g., \$670 in 2008).

(b) If the beneficiary had attained all four of the milestones under the prior rules, the next milestone to be achieved would be the first Phase 2 milestone (a calendar month in which the beneficiary has worked and has gross earnings from employment or net earnings from self-employment that are more than the substantial gainful activity threshold level, e.g., \$900 in 2007).

(c) The maximum number of outcome payments available to an EN with respect to a ticket for a transition case will be computed as follows: